

MARKETING STRATEGY PLANNING WORKBOOK

A practical framework for turning business objectives into focused marketing decisions.



SEOandCROJourney.com

Chris Hinksman

Contents

Section	Page
How To Use This Brief	2
1 – Business Objective	3
2 – Current Situation	4
3 – Target Audience + Audience Problem	5
4 – Positioning + Key Message	6
5 – Customer Journey	7
6 – Channels	8
7 – Content Themes	9
8 – Measurement	10
Strategy Review Checklist	11
Marketing Strategy Summary	12
Notes Page	13
Final Thought	14

How To Use This Workbook

A marketing strategy doesn't begin with choosing channels, creating content or analysing reports.

It begins by understanding what the organisation is trying to achieve, who it is trying to reach and how marketing can help move the business towards that objective.

This workbook follows the same process many marketing teams use when developing a strategy. Each section builds on the previous one, helping you think through the business objective, the audience, the problem you're solving, your positioning, the customer journey, appropriate marketing channels and finally how success will be measured.

Take your time completing each section.

There are no perfect answers, only better questions.

By the end of this workbook you will have created a simple, structured marketing strategy that links every marketing activity back to a clear business objective.

Good marketing doesn't start with campaigns. It starts with understanding what the organisation is trying to achieve and how marketing can help achieve it.

Before You Begin

As you complete each section, ask yourself three questions:

- **Does this support the business objective?**
- **Does this make sense for the audience?**
- **Will this help us make better marketing decisions?**

If the answer to any of those questions is **no**, revisit the previous section before moving forward.

The Strategy Brief

What is the organisation trying to achieve?

1 - Business Objective

What is the primary business outcome this marketing strategy needs to support

Business Objective:

How will we know the business is moving towards this objective?

Avoid: “Increase social media engagement”

Think Instead: “Increase qualified demand from (target audience)”

2 - Current Situation

What is happening now?

What is currently working?

What is not working?

What evidence do we have?

What assumptions are we making?

What constraints exist?

Current Evidence

What we know

What we think

What we need to learn

3 - Target Audience + Audience Problem

Who are we trying to reach?

What problem, frustration or desire are we addressing?

The audience is:

They currently experience:

They are trying to:

The problem matters because:

Avoid: “What demographic group are we targeting?”

Think Instead: “What is the person actually experiencing?”

4 - Positioning + Key Message

Why should this audience care about this particular solution?

If the audience remembers only one thing, what should it be?

Formula:

For (audience) who are experiencing (problem), (solution) helps them achieve (desired outcome) because (reason to believe)

Key Message – ‘The one thing we want people to understand is:

5 - Customer Journey

Awareness

How does the audience first discover us?

Consideration

What information do they need before taking us seriously?

Action

What do we want them to do?

Retention

Why would they return, remain engaged or continue the relationship?

What question is the audience asking at each stage?

Stage	Audience Question	Desired Behaviour
Awareness	Do I have this problem?	Explore
Consideration	Is this relevant to me?	Investigate
Action	Should I take the next step?	Convert
Retention	Was this valuable?	Return

6 - Channels

Where does this audience already spend time, seek information or make decisions?

Channel	Audience Behaviour	Strategic Role
Search	Actively looking for answers	Capture existing intent
LinkedIn	Professional discovery	Build authority
Email	Existing relationship	Nurture and retain
Social	Discovery and conversation	Create awareness

Chosen Channel:

Why this channel?

What role will it play?

7 - Content Themes

What should the organisation consistently talk about to remain relevant to this audience?

I would suggest 3-4 content themes.

For each theme:

Theme:

Audience problem it addresses:

Strategic Role:

Example Topics:

8 - Measurement

What should a marketing strategy actually measure?

What are we trying to achieve?

What behaviour would indicate progress?

Which marketing metrics can help us understand whether that behaviour is occurring?

What would we do differently based on what we learn?

Objective	Desired Behaviour	Leading Indicator	Decision
-----------	-------------------	-------------------	----------

Strategy Review Checklist

Strategy Review Checklist

Before Finalising Your Strategy, Ask Yourself:

- ☐ Does every marketing activity support the business objective?
- ☐ Is the audience clearly defined?
- ☐ Does our positioning solve a genuine problem?
- ☐ Is every chosen channel justified?
- ☐ Have we identified meaningful metrics?
- ☐ Could someone outside the organisation understand this strategy?
- ☐ Does every section logically connect to the next?

Marketing Strategy Summary

Business Objective:

Target Audience:

Core Problem:

Positioning:

Key Message:

Priority Channels:

Content Themes:

Primary Measurement:

Next Strategic Decision:

[illegible]

Final Thought

A marketing strategy isn't a document.

It's a series of connected decisions.

Every objective should influence the audience you target.

Every audience should shape your positioning.

Every message should support your customer journey.

Every channel should have a clear purpose.

Every metric should help you make a better decision.

When each part connects to the next, marketing becomes far more than a collection of campaigns—it becomes a system that supports business growth.

Chris Hinksman
SEO and CRO Journey